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ABSTRACT

Traditionally, transfer of learning has been a concern only during coursework. It has become clear, however, that there are a number of transfer enhancement strategies that educators and trainers can successfully implement before, during, and after organized learning experiences. Even before training begins, trainers can begin to enhance their students' ability to transfer their training by collecting baseline information concerning (1) the labor needs of the organizations whose employees will receive the training and (2) the skill deficits of the same employees. Such information can be collected from advisory groups, needs assessments, task analyses, and interviews with supervisors and training program participants. Transfer-of-training strategies for use during training include involving participants in the learning process, providing adequate time for practice and feedback, incorporating real work as a part of training sessions in the form of case studies, encouraging co-workers to attend learning sessions, providing time for discussion concerning the debriefing of management about the session, and developing a backsliding prevention program. After the program is over, transfer of learning can be enhanced by sending out flyers highlighting strategies to participants and following up on participants and managers to assess the usefulness of the training program's content. Managers can enhance trainees' transfer of learning by reinforcing positive behavior, by using the jargon used in the learning event when communicating with employees, and by incorporating the results of learning events into performance appraisals. (MN)

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FACILITATING TRANSFER OF LEARNING TO THE WORKPLACE

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The major concern of Performance Technology and/or Human Resource Development (HRD) in the corporation, or the public sector, is to improve job-related performance. That improvement is usually provided through solutions that may or may not involve the development and delivery of instruction. But, when training and education have been selected as the most appropriate intervention for performance improvement, transfer of learning from the workshop to the workplace is of key importance.

A number of transfer enhancement strategies can be implemented BEFORE instruction, DURING the organized learning experience, and AFTER the learners have returned to the work environment. Traditionally, though, transfer of learning has been a concern only DURING coursework. In fact, a time continuum

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exists -- BEFORE, DURING, and AFTER --- and designers of instruction need to look at all three phases when selecting transfer enhancement strategies. Designers must think of what occurs during the learning event as one series of strategies and consider adding other strategies during the BEFORE and AFTER time frames.

This presentation will identify a series of alternative strategies that Performance Technologists, HRD personnel, and Adult Educators can use to enhance the transfer of job-related learning (1) before the learning event, (2) within the controlled environment of the classroom or workshop and (3) in the workplace environment.

BEFORE - STRATEGIES

Practitioners are capable of conducting needs analyses to detect deficits and opportunites before the learning event. Normally this involves doing problem analyses, task analyses, person analyses, and organizational analyses. These practitioners are also expert at working with subject matter experts and can produce volumes of data with regard to specific tasks that need to be included in a learning package. Again they are also very competent at assisting in the matching of people and tasks. The area that receives the least amount of attention

and possibly holds the greatest resource for support for ensuring transfer of learning may be in what goes on in the work environment.

Work Environment / Organizational Culture: QUESTIONS to Explore

Knowing more about the environment in which the learner will operate will better assist in the design of instruction and the transfer of the new learnings to the workplace. Ideally both the learner and the workplace want the same results, improvement in job-related behavior.

Much time is spent preparing the learner and the learning event and very little time is spent on preparing the workplace to accept the new interventions. Therefore the following questions may help provide additional background information that can be used when formulating strategies to incorporate and prepare for transfer.

* What is the business of the business? Do the employees know where and how they fit?

* Does the organization have situational specific methods that it uses that are not normally found in other sectors? Would it be possible to capitalize on this uniqueness?

* In what areas is the organization dependent upon other organizations? Will other organizations be impacted by internal changes?

* What is the state of power and authority in the organization? Would it be possible to co-op key figures to support a plan?

* What are the formal and informal rules and regulations that will affect (support or conflict) the introduction of alternative ways of doing things?

* Will the work community be receptive to change? Will time be needed for promotion of the concept?

* Does the learner's values or the co-worker's values allow them to be accepting of the kind of change that will result from the intervention?

* Do the goals of the intervention align with the goals of the organization? If goal conflict is expected, how will this organizational circumstance be incorporated into the sessions?

* How do the environment and workforce interact to accomplish goals?

What You Can Do

Some of the baseline information collected from the above inquiries can become key elements for enhancing the transfer of learning. It may be possible to integrate what is learned into one of the following actions.

* Form an ad hoc advisory group. Membership in this group needs to be composed of key informants and decision makers. Insure that the group will have a vested interest in the deliberations. Elicit numerous examples on how each are related to the problem being solved and their role in supporting the solution.

* Develop a questionnaire or interview schedule that will collect data concerning organizational climate, hierarchical relationships, and perceived problem areas. Respondents can be identified by the ad hoc advisory group or in consultation with key informants in the work group.

* Develop a needs assessment that will be responded to by all participants and supervisors. Include a section that asks for a list of any barriers to learning transfer. Use this data in the learning event.

* Work with key supervisors and get a commitment of support to the project. There needs to be a demonstrated need that management can see that training or education will make a difference. The problem that is being solved should have such a

high importance that the manager will be part of the team that will want the new skills maintained long after the training program.

* Educate supervising members of the work environment to see that there can be a problem with the transfer of learning without his or her active support. Help identify a series of behaviors that will elicit good transfer and retention.

* Communicate with participants and have them meet with supervisors to establish what would work best to ensure retention after returning to the worksite. At the same time this is a good opportunity to work on developing positive expectations for what the learning event will do for job-related performance. It would also be appropriate to give assignments to the participant at this time. The assignments could take the form of data gathering, advanced reading, or case study analysis.

DURING - STRATEGIES

Most HRD personnel or Instructional Technologists have at one time spent most of their energy delivering instruction. It seems natural then for them to believe that any changes that occurred in the learner had to happen during the learning event. For example, having to teach a skill often took the greatest amount

of the time and left concerns about transfer and retention as secondary. At best, lip service was given and some heed was given to back-on-the-job concerns. Often this occurred near the conclusion of the program. There wasn't the awareness or concern to look at improving performance in terms of a time continuum model (before, during, and after) that suggests further opportunities exist during the other two phases: before and after. The during phase still contains the most popular and often cited strategies.

The following are generally accepted as being effective when used during the learning event.

* Involve participants in the learning process. Those involved are more likely to integrate behaviors into their everyday actions.

* Practice and feedback need to be an integral part of learning.

* Allow time for participants to maintain a notebook of key ideas learned and possible on-the-job application throughout the learning event.

* Incorporate real work as part of the session in place of case studies.

* Encourage co-workers to attend a learning session. This promotes colleague reinforcement at the worksite.

* Provide time for discussion concerning the debriefing of management about the session.

* Backsliding Prevention. There is a tendency in most programs to emphasize the positive results of training and ignore or play-down the negative aspects of introducing a new process. There may exist not only backlash pressures from the work environmnent, but also from the natural human tendency to slip back into old habits. Some programs do have simulations that introduce alternative methods for coping with backlash or high risk situations in the workplace. Before or during the learning event elicit from participants the barriers they expect will exist when he or she returns to the workplace. These barriers exist because the organization has authority structures, standard operating procedures, and reward systems. Incorporate these unique barriers into role plays and case studies. Reverting back to old habits once the glow of the learning event has passed can be a problem. Contending with backsliding is one area that receives little attention in the learning process. A very promising technique is to introduce the concept of BACKSLIDING PREVENTION. This system is a self-control strategy that can be helpful in improving job related performance. The system is based on the premise that if a participant can recognize situations that are of high risk to backsliding, he or

she can choose to prevent it from happening by developing coping responses that result in increased self-effectualness and decrease the probabilty of a relapse. (See Marx, 1982 for a complete description of relapse prevention for managerial training.)

AFTER STRATEGIES

Learning experiences are provided to help improve performance on the job. The learning specialist is usually quite confident that learners are competent when they leave the learning event. The learning specialist has control within the classroom because he or she has created the environment and knows and understands many of its variables. The work environment has many variables that are not controllable by the HRD person, let alone totally known to those who constitute that population.

No matter how expert the professional designers and delivers of instruction may be, they cannot create miracles. It will be impossible for them to be on hand to reinforce the transfer and maintenance of behavior on the job. But there are certain strategies that can be suggested that can be used by employees, managers, and occasionally HRD personnel. These actions are categorized according to the originators of the stimulus to assist in the maintenance of desired job-related behaviors.

Participant Actions

* The backsliding prevention model introduced above can be implemented by participants.

* Participants can establish a "buddy system" to get support for maintaining the new behaviors. This could take the form of five minute meetings before and after a work session.

* If it is appropriate, establish a support group to provide general encouragement.

* Refer to job aids introduced during the learning event. The buddy system mentioned above could use the job aid as a focal point for discussion.

* Graph or monitor progress in those activities in which difficulties are anticipated.

Manager Actions

* Regularily reinforce positive behavior. This is the most efficient and effective activity that can provide the highest return.

* Use the jargon used in the learning event when communicating with employees.

* Incorporate the results of learning events into individual performance appraisals.

HRD / Performance Technologists Actions

* Send out letters or flyers to participants highlighting strategies.

* Follow-up on participants and managers to discover the usefulness of strategies introduced during the learning event and solicit additional approaches that will assist others in the maintenance of behavior.

SO WHAT?

This presentation has introduced a time continuum model for enhancing the transfer of learning from the learning environment to the workplace. A variety of strategies were presented that can be used by the learner, the manager, and the learning event designer.

Further Reading

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